

UTMOST TRUST ANALYSIS SERVICE

OVERVIEW OF THE SERVICE

- › Explain with clarity the workings of the trust
- › This will include the trust tax position and the effect on interested parties
- › Options regarding potential investment decisions and implications
- › Reconfirming your understanding of the trust where applicable
- › An analysis can be requested for an existing trust or prior to one being established.

HOW DO YOU ACCESS UTAS AND WHAT DOCUMENTS DO I NEED TO PROVIDE?

Speak with your Regional Sales Manager to request a report

We will require the following:

- › Original trust document or will
- › Supporting information i.e. letters of wishes, deeds of variation, etc.

WHAT WILL YOU RECEIVE?

A detailed, independent and unbiased report including:

- › The type of trust including its main provisions and powers
- › Income tax, CGT and IHT treatment of all parties to the trust
- › Options available for the investment of the trust fund.

Expect a full response within 8 working days.

A WEALTH *of* DIFFERENCE

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